Toolbox

(Free and unrestricted management tools)

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I. Preface

This document aims to become a collaborative resource for shared management tools that are free and unrestricted.

We will show methods that can be reproduced, often requiring only little resources and skills to be used.

> You say, “That thought is mine.” No my brother,
> It is in you, nothing is ours.
> Everyone has had it or will have it. Reckless kidnapper, In the common domain,
> far from subtracting it, Make it like a deposit: Sharing is so sweet!
>
> Henri–Frédéric Amiel, *Nothing is ours*

This work is open to collaboration, for completion and coherence.

This document is definitely imperfect, incomplete, and may contain some mistakes. You can contact us at bonjour@graineahumus.org to take part in improving this booklet.

Find the latest version on www.graineahumus.org.

This document was translated by Charlie and Mathieu.

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II. Licenses

Version 1.1 (July, 2025) by Ben LARCHER, member of the association “De la graine à l’humus”.

III. Introduction

Created at first for associations, this document aims to teach to as many people as possible how to create a management toolbox, whether it is for an association, a social center, regular citizens, a town council…

These management methods aim to help along meetings, planning, analysis, improvement, ambiance or even creativity.

We strive to favor fun, cross-disciplinary and egalitarian methods.

This document is shaped above all for participation and to be reproduced!

IV. Project management

It is often useful to find some time to present the methods used and their usefulness. What comes next presents the overall method.
Methodology can be seen as restrictive and limiting, which can be the case depending on the method, context and use. But there can be issues if no methodology is used: people not being heard, some having dominance over others, a tribune aspect, difficulty to implement an efficient collective intelligence…
Therefore, the goal is to understand which method to use, in what context, and what it leads to.

IV. 1. Introducing poem

Everybody – Somebody – Anybody – and Nobody
(Unknown author)

Once upon a time, there were four people we called Everybody – Somebody – Anybody – and Nobody.
There was an important job to be done
and Everybody was sure that Somebody would do it.
Anybody could have done it, but Nobody did it.
Somebody got angry about that because it was Everybody's job!
Everybody thought that Anybody could do it,
but Nobody realized that Everybody wouldn't do it…
It ended up that Everybody blamed Somebody
when Nobody did what Anybody could have done.

Moral

Without blaming Everybody,

It would be a good thing if Anybody did what they need to do without hopping Somebody will do it for us…

Because experience shows that when we are waiting for Somebody we usually find Nobody.

This poem is mocking what a bad organization looks like. It demonstrates the importance of clearly defining (and sometimes organizing) who does what (when and sometimes how).

IV.2. Personal understanding

Two questions to help us define our own perceptions and expressions.

Each one of you answer on their own, without consultation, to the following questions.

- You have to walk for 0.5 miles (1km) with a heavy bag, but you think it's going to be fine. How heavy is the bag?
- You are going home on foot and you're a bit tired. The walk is pretty long, but you think it's going to be fine, no need to call a cab. How long is the walk?

Compare your answers.

It is essential to know how to set tasks, roles and deadlines. We all understand words in a certain way. It was the goal of the previous questions to demonstrate that. Everything that is not stated will be understood in people's own perception. Which can be fine for some subjects, but can also be a problem for other subjects.

IV.3. Organization

This part will show the benefits of using management tools. Here are some elements to illustrate it.

IV.3.1.a. Who

IV.3.1.b. Authority

Defining the roles is essential. In an association, the roles and powers of the board and the committee are defined by statute, but it is not the same for every roles!

IV.3.1.c. The volunteers

There are, in some associations, a lot of volunteers we are relying on that are not always there for the D day. "Volunteer" comes from the french "volontaire" meaning "acting on one's own will". Withdrawals are possible and we have to learn how to deal with it...

We can prevent this issue like this:

- ask for attendance confirmation prior to the event;
- plan for volunteer back-up in case of unfortunate events or plan for three volunteers when two could be enough;
- make the events more enjoyable for the volunteers (more festive, fun, food available…).

IV.3.1.d. Points of contact

Points of contact and commissions can be necessary to lighten meetings. It is thus fundamental to define their roles.

For example, there can be several possibilities for a commission or a point of contact:

- make proposals that are then voted by the board;
- manage entirely a task delegated to them;
- delegate tasks to other people.

Some of these roles can be opposite to each other, thus the necessity to define them and their fields of action.

In a sociocratic point of view and even more for an entity managing an association, commissions usually make proposals that are then voted by the board. It is still possible to delegate specific tasks.

A commission handling a part delegated to them may be conflictual in a structure as it may not represent the view of every one, sometimes representing the view of only a minority or a single person. Furthermore, it can:

- reveal management issues that would lead to not having the time to transfer proposals;
- generate errors that could have been avoided…

If there are multiple commissions, it may be necessary to build bridges between them.

This can be done in several ways:

- during board meetings or inter-commission meetings;
- online with sharing softwares to make advancement visible for all commissions.

IV.3.2. What

Tasks must also be specified (quantity, price, deadlines, related tasks, tools necessary…).

In order to link the different tasks, it can be useful to display them and the people working on them on paper or digital posters. We can also have a calendar or we can get to know how tasks are related. For example, preparing a text is related to its page layout and then to its printing.

IV.3.3. When

Unexpected events are inevitable! For tasks to be done, plan a minimum time and a margin (usually, the margin is 20% of the planned time but it can vary according to the field you are working in).

Unexpected events are even more obvious when it is about related tasks…

To rest on previous experiences and debriefs is therefore very useful.

To deal with the time you have, it can be helpful to be autonomous as much as you can and not to depend too much on service providers/volunteers/renting…

IV.3.4. Where

Where are the various actions taking place?

IV.3.5. How

What are the available resources? (material, partners, previous debriefs, finances…)

IV.3.6. What organization

It is usual to create a report/poster/flyer… with pretty visual elements but also with an inconsistent content, organization, or final rendering.

As printing is the last task you will do, this step is sometimes done in a rush. This can be a result of a previous task returned too late (writing, proofreading, page layout…).

We can reduce the impact of these problems with reminders, or by asking to people who are known to be late to return their production ahead of time, or by adding time margins. It is also useful to know how much time the people you are working with take to write…

V. To get off a good start 1/2

It is important to understand the logic behind the setting up of a management method, especially in groups. We will see that with the “leek pie”.

One can loose themselves in the use of methods and tools. The overuse of tools and methods is detrimental.

Thus, one need to use only the right amount to ease their life, not too much.

To understand the principle, we will use the leek pie.

V.1. The leek pie

Here, the project we want to do is the leek pie. It will allow us to see the steps that are working for a leek pie as much as for building something or setting up an event.

Taking something that looks easy will make it easy for us to understand the steps leading to the realization of a project.

V.1.1. The project

First things first, our project is to make a leek pie.

A “project” is the idea that we “project” to make.

A project is motivating when the idea behind it is motivating. If we do not like leeks, we might as well do something else... Do something that you like, that is exciting for you and the target audience!

No allergies? Does everyone like leeks? Let’s start!

V.1.2. The idea of the dish

Maybe it came spontaneously, or maybe we roamed online, or maybe we read books or maybe we asked people, or, in other words, we used resources.

Resources of good quality are important. With internet, resources are more numerous than ever!

To improve oneself, it is important to look at the grades of the pies that were made in the past to see if everything worked well.

V.1.3. Cookbook

With time we build our own cookbook with what we master!

Stay in touch with other people and their recipes to keep enriching yourself.

Preferences are to each their own, so choose something that will suit everyone.

V.1.4. The shopping list

We discussed ingredients necessary and adapted them based on existing recipes.

Once we know what we are doing, we have to write our shopping list.

We set the number of pies for the quantities of ingredients we have (or the metrics for a construction, material and immaterial resources available for an event, etc.).

V.1.5. The shopping

To go shopping, we need to prepare a budget, with a maximum, and if needed, transports, drivers, people to help carry the groceries, fridges…

V.1.6. The cooking

Mixing the ingredients altogether is not enough, we have to follow a set order.

V.1.7. Is the pie good?

We will not know until we try it. It is best to test it beforehand rather than when everyone eats it.

V.1.8. Will we make a leek pie again?

Maybe another time. However, we will need more, and maybe with shroom pies as well.

To improve ourselves, it would be useful to write notes that we can read next time.

V.1.9. Break the rules

Sometimes we break the rules we just established with variations in the design. We have to know why we do it though.

Example 1: We want to finish the leftovers in our fridge. We are looking for a recipe that uses the ingredients we have and we can add more of our own if necessary.

Example 2: We want to use the leftovers from yesterday. We take an existing dish as a baseline and we then adapt the recipe to our needs.

Example 3: Sunday diner. Grocery shops are closed, what can we do with what we have without going grocery shopping?

Example 4: Internet is out and we do not own a cookbook. We will tend to use recipes that we master and know are good or recipes that are similar.

VI. To get off a good start 2/2

To set up new methods, we can proceed in several steps. This allows us to avoid reluctance thanks to co-construction and an overall view, which permits to take the various members of the association into consideration.

VI. 1. Description

VI. 1.1. Tools, what for?

We already developed the presentation part in the introduction of project management part. This section showed the interest of using methods/tools.

This is a good step to avoid reluctance.

Reluctance can come from the unknown. When some members are strangers to meeting tools or digital tools, and if it is necessary for the organization, it can be useful to employ skills in order to train people on basic aspects. This can be done with external organizations, self-help groups, trainings...

VI. 1.2. What are the impacts?

The tool you chose will have multiple impacts:

- It makes the work easier (if not, is the tool really useful?);
- A tool is shaping what we think (is the tool considering our values? Does it alter our values?);
- It is built for a task, but it can take the incoming and previous tasks into account if we want an overall view;
- Alone, it often is not enough, it needs human management (point of contact, representative... who will explain, hand over, remind...);
- A tool can be a software, a paper media, a playful approach...

VI.1.3. What tools?

Tools are adequate, or not, for an organized conception in time.

In this case, we can use the PDCA cycle, time circles, PERT chart, or a flowchart.

Otherwise, we can use pivot tables, the seven steps method, project terms of reference...

VI.1.4. Example

Let's give an example with a flowchart that we briefly explained with process analysis.

For our example, let's take the members. We could also have picked social partners, financial partners, or an event or a product's production...

VI.1.4.a. The first meeting

We gather as many people as we can to tackle the subject. Do not forget dispensations and the order of the day with details of the collective approach so the people who are missing can also participate.

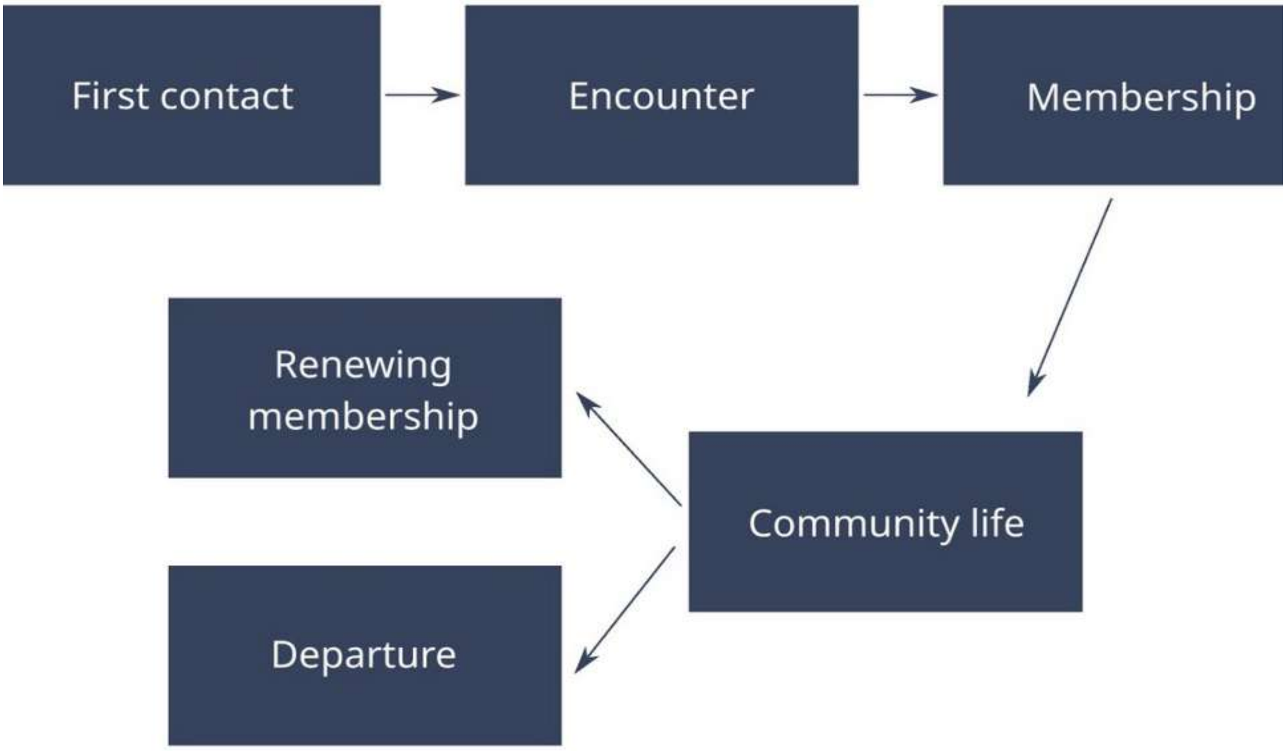
On a first meeting, we need to think about the different interactions between the members and the association. We can do it by brainstorming, which is tackled in parts 2 and 3 of the seven steps method.

The more elements are divided, the more accurate the analysis is.

Therefore, we obtain:

- First contact
- Renewal
- Membership
- Departure
- Community life
- ...

Secondly, we think about the elements' organization.



Finally, for the next meeting, we ask the participants to look for tools that could be useful at every steps. We also ask them to think about some steps we may have left out. The people missing receive the report with the same instructions.

VI.1.4.b. The second meeting

For the second meeting, the displayed tools can be diverse.

For example, for the "first contact" part, we have the following propositions:

- refer to a presentation paper for phone contacts;
- have e-mail templates for e-mail contacts;
- have automatic answers on the phone like "please press 1 for this information…";
- train members of the association for them to know how to establish contact;
- have a check-list of elements to announce;
- have a contact paper to take some notes when we establish contact.

Therefore, we have a diversity of propositions for each parts.

To chose the ones we keep and set up, we can take into account the following elements:

- What are the association's values?
- Can a tool that simplifies a step connect with the previous and incoming steps correctly?
- Can a tool be used for more than one step?
- How easy it is to set up?
- How easy it is to use?
- Are there any restrictions (financial, legislative, safety, good practice…)?
- Is it inclusive?…

VI.1.4.c. The set up

The set up must be documented (if no one knows about the tools or the processes, it is useless). We can create a guide for the members, the board of directors, or the employees, or we can display it on a wall… In any case, we can use again the diagram we introduced and completed with the methods used, and we can indicate at the bottom of the page the restrictions and elements taken into account to take the decision.

As it was said before, human management is needed (point of contact, representative… who will explain, hand over, remind…) for a permanent set up.

Methods can be set up by taking our time, specifically in an organization with many members!

Test phases are necessary (at least two, one in a smaller group to "deal with teething problems", and a second one to include everyone).

The methods that were not kept (too expensive, complex set up even if easy to use…) can be potentially set up in the future.

VII. The main documents

What are the usual documents used during meetings and during project plannings? How to use them? Reports, debriefs, action-sheet…

VII.1. Framework

Writing of documents for meetings or for the planning of action.

VII.2. Description

When we are preparing a meeting, an action or a long-term project, we use documents.

There is no point in writing those documents if they are not useful!

Furthermore, a preparation meeting that does not lead to an action beginning is not useful (this does not apply to “conflict management” or annual account types of meetings).

We will follow these steps:

1. Why are we doing the meeting? (concrete goals)
2. How are our goals reflected on the documents written during the meeting?
3. How do we set up the actions we decided to do after the meeting?

VII.3. Notes

No matter the documents, it is favorable to write it during the meeting so that everyone can see it.

Receiving a report a month after the meeting is usually no longer useful. The actions to undertake may have already been done or it may be too late. Furthermore, because it is hard to have a very accurate memory of the meeting, it is hard to undertake what was decided without written documents. We are influenced by the way the documents are written. Sometimes, we do not bother reading them…

Writing during the meeting enables everyone to acknowledge and understand the documents. Writing will always have bias, it is something natural. Sometimes rewording might be necessary. For example, terms like “no more pepperoni pizzas” are not very suitable when written. Do we need to completely stop ordering pepperoni pizzas or is it simply an indication to not order more than there was?

A report can be written in collaboration during the meeting. A note-taker role could be very beneficial.

VII.4. Report

A report is the base reference of what was decided. However, there may be mistakes.

It must, in theory, be proofread to avoid it. Unfortunately it is usually not read by everyone and/or written late when the brain is tired...

There are several solutions to avoid that:

- The report is written during the meeting and projected on a wall or shared online.
- Proofreading at the end of the meeting is necessary, preferably after taking a break so that the brain is rested.
- Avoid longer paragraphs and keep it simple...

Depending on the type of meeting (board meeting, collaborator meeting...) it can be relevant to have different models of reports to best suit the meeting. We provide two templates:

- A board meeting report.
- A collaborator·s meeting report.

Following continual improvement, feel free to change the templates as time goes by!

It is important to know who attended, what was the context...

Board meeting report:

In our example, here is what is necessary:

- the place, the people attending and their roles;
- a recap of the rules;
- a “current projects” part, where people are informed of the status of current projects;
- a sociocratic part, where we acknowledge or not elements (see: decision-making);
- a debate part, at the end because it usually takes more time and asks to be mentally active.

Collaborator·s meeting report

In our example, here is what is necessary:

- the place, the people attending and their roles;
- a recap of the context;
- a part to introduce the different players, and the project;
- an open debate.

In this example, it is a presentation meeting, to debate of the possibilities. If the collaborator·s meeting is about the creation of a project, we will then use an action-sheet as a complementary document or even as a standalone document.

VII.5. Debrief

We often do debriefs when we undertake actions or during events.

If we do not use those debriefs, then the same mistakes will happen again when we implement future actions!

When setting up an action, we always keep in mind the past debriefs for continual improvement!

With the principle of the PDCA cycle, an example of taking into account past debriefs is displayed on the action sheet.

VII.6. Action sheet

An action sheet is made of a recap of all the elements (people, prices, dates, resources, related tasks…) that might be relevant, especially when we delegate. It is kind of a scientific report.

For more complex and/or longer project, a Gantt chart, PERT chart or a project terms of reference are sometimes more suitable.

VIII. Decision-making

Presentation of decision-making tools that take multiple people in consideration. How does it work? Is every tool egalitarian and democratic?

VIII.1. Framework

A meetup where one or more decisions must be taken.

VIII.2. Description

When we take a decision during a meeting, we often use the vote system. Is this system fair? Not necessarily… demonstrations with videos at the end of this article.

A majority vote can be the source of frustration and division.

Here are some systems that you can implement in a meeting.

VIII.3. Consensus

We talk about a consensus when, on a similar theme, results end up on convergent conclusions. A consensus can always be questioned by other studies — André Zylberberg (head of research at CNRS)

A consensus involves a preceding discussion, a display of the facts, and kindness.

After the discussion, we look for a solution everyone agrees on.

VIII.4. Consent

Consent is different from consensus which means there will be some diverging ideas.

Consent means there is no opposition. If no one is against a proposition, it is accepted.

VIII.5. Atmosphere vote

We can use “atmosphere votes” to probe what people think.

With atmosphere votes, everyone can participate, even the ones who cannot vote in the meeting framework. Therefore, we can make the most of everyone’s knowledge.

Votes can identify the minority that could:

- share a different view because they consider elements that are unknown to the majority, and can therefore share them;
- share a different view because they lack elements and can therefore let everyone know that they have more information.
- …

VIII.6. Kindness

More than a word, kindness can become a method.

- If we disagree, we talk about it while thinking about the association’s interests (status, members, board of directors, volunteers, employees…). All without looking for a conflict.
- We address our point of view in tune with the association’s interest calmly.
- We allow everyone to speak and we pay attention to the minority who could hold some details the majority do not know about.
- In any case, be kind and intellectually honest (admit when you do not know or you are not sure)
- Two seemingly diverging ideas can actually end up in a third one implementing both.

VIII.7. Sociocracy

All the previous elements can be used with sociocracy.

A principle we can apply with a sociocratic system to avoid this would be:

- let people with unpopular opinions express themselves so we can understand what is restraining them;
- detail problematics into specific subpoints;
- check if different propositions that seem contrary can actually be compatible;
- take non-voters into account so it can highlight a lack of details or understanding of a project by some people, which would need to be cleared up;
- bring more elements if there is a conflict, even if it means delaying the decision;
- create a pros and cons table;
- have “strong” votes if it is essential to vote (with 2/3 or 3/4 for example, instead of 1/2)
- ...

IX. Recommendations for meetings

This is not a scientific method but rather elements to improve a meeting. Time to think, breaks, food…

IX.1. Framework

Managing a meeting longer than 1 h 30.

IX.2. Description

Ideally, a meeting should not last longer than 1 h 30. Longer meetings have major drawbacks:

- the brain gets really tired;
- the votes near the end are out of "exhaustion", especially during conflicts;
- it becomes hard to think about the proposals;
- superordinate/subordinate dynamics start to appear, leading to frustration;
- people grow hungry and get tired, making them irritable and distracted;
- …

Unfortunately it is not always possible to make meetings of less than 1 h 30!

There are some tips to alleviate the issues of longer meetings:

- create funnier and friendlier meetings;
- prepare beforehand a detailed order of the day and the proposals, or even send it to the members prior to the meeting;
- take 10 minute breaks every 1 h 30;
- have more frequent meetings;
- provide food and beverage;
- lighten the order of the day by creating commissions or by delegating, by postponing some subjects at another time if they are not urgent…;
- have a nice environment;
- use methods like “meeting roles” and “meeting signs”
- …

A qualitative reception and a clear definition of the roles are key factors.

X. Action sheet

That sheet displays what is necessary to do for an ongoing action and saves time for future ones. All-in-one reusable!

X.1. Framework

The action sheet is used when setting up a punctual action.

X.2. Description

The action sheet is a classic that must not be forgotten!

One quick look at the sheet and you know what you have to do for easy actions, and, following the principle of continual improvement, it saves time for future actions.

ACTION SHEET

Before starting, you can rely on previous debriefs for continual improvement!

Description

Date / Duration

Collaborators

Place / Range

Preparation

Method (reverse scheduling)

Manpower

Materials

Investment and outgoing costs

Expenses		Takings	
TOTAL		TOTAL	

Tools and communication

Educational tools

Ways to communicate

Communication media

Contacts

X.2.1. Summary

The first part details the context of the action (description, date, place, partnerships…).

It makes it easier to identify similar past action sheets that may contain improvements to put into the current action sheet.

X.2.2. The preparation

The second part, the preparation, uses the 5M method: Method, Manpower, Materials, Money. The last M is missing: Maintenance. It is usually not used for punctual events but more for mid to long-term events.

X.2.3. The communication

Communication is a key element that needs its own section.

Goals

Costed or relative goals (indicate the grades)

Goals	Grades

Means of goals analysis (tools to obtain grades)

Goals	Tools

Debrief

Goals analysis

Goals	

Continual improvement (notes according to the debrief)

General notes

Annex

X.2.4. Goals

Why are we doing that action? Although it might seem like an easy answer, it is important to define goals and indications beforehand so we can know if we reached those goals. It also gives more purpose to our actions.

These indications will be important elements for the debrief.

It is possible to have open goals known by everyone as well as "secret" goals.

X.2.5. Debrief

It is important to take notes on the mishaps, even if little, so that we can improve for next time. Example: "Michel cut his finger, but it was very shallow" might lead to add a first-aid kit in the "materials" for future events.

During the debrief, do not get trapped in the "who's fault is it?". If an element was not defined, it is common to improvise, even if sometimes it does not work.

Example:

- if there was a typo on the flyer, appoint a proofreading committee;
- if an awkward situation happened, what lead to it and what do we do next time we face it?

XI. The meeting roles

Roles facilitate debate and meeting management. They also help for the report. Time-manager, note-taker and speaker, the ingenuous...

XI.1. Framework

The roles are used during a meeting. It makes interactions much easier, especially if there are lots of attendants. It is still nice to have them for little groups.

XI.2. Description

Defining the roles enables easier debate, no fighting to speak, no interruptions, giving space for everyone to speak their mind, not having longer than necessary meetings... To make it easy, it is possible to print the roles on cards and give them to the people.

One advantage is that the cards explain the roles, meaning it is an easier set-up.

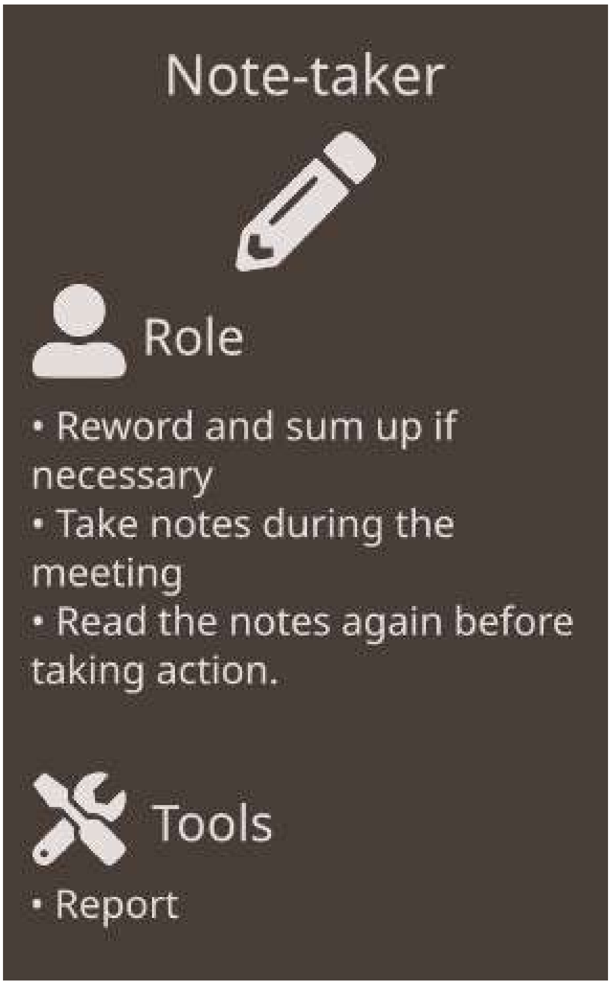
XI.2.1. Time-manager

The pair “time-manager” and “distribution of speech” are leading the meeting.

For time-managers, a common issue is time not being clearly defined. Here are some solutions for this issue:

- base yourself on previous meetings to allocate time;
- add 20% more time;
- plan time for miscellaneous questions;
- if too much time is used for a single point, interrupt and create a commission;
- if no consensus or consent is achieved, bring new elements to think about for the next meeting;
- ask for a vote…

XI.2.2. Note-taker



What is acknowledged during meetings is what is written down!

It is important to reword, to be clear and to take notes during the meeting for the report. If possible, your notes should be visible by everyone. Then, during the meeting, we can correct ill-putted or unclear sentences.

XI.2.3. Distribution of speech

The speech distributor does not only wait for signs, they watch for hesitating people, non-verbal language...

XI.2.4. Ingenuous

A more optional role that may be useful. It is a person who asks the questions that others would not dare to ask. What is the current project? What does this acronym mean? What does this partner do?...

XI.3. Notes

It is nice to change the meeting roles to not become a prisoner of your role.

We then avoid the misunderstandings for the less enjoyable sides of a role.

For example, when a time-manager asks to stop a “heated debate” to bring new elements and make a commission, it can be frustrating.

XII. Meeting signs

This method makes speaking easier while respecting each other. A better distribution of the time of speech, to listen to each other, to save some time…

XII.1. Framework

Signs are used during a meeting. This makes meetings with lots of members easier, but it can also be useful during meetings with a small group.

This method needs the “distribution of speech” at least (see meeting roles).

XII.2. Description

To organize a meeting with gestures can be very useful, specifically when there are many people. This allows:

- a better distribution of speech;
- to listen to each other;
- to save some time…

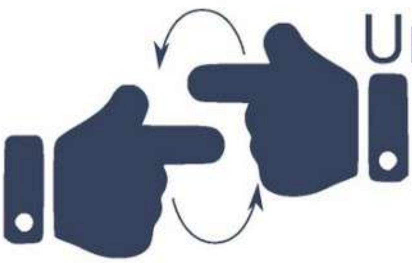
Non-verbal communication is not always a strong suit in France. This method is helpful to clear up some aspects.

Asking to speak
(Towards the person
speaking)

Technical point
(Towards the person
speaking)

Agreeing with what is said
(Towards the person
speaking)

Please explain
(Towards the person
speaking)



Understood, please keep
going
(Towards the person
speaking)

The “technical point” is linked to what is being said, it is a priority for the next person speaking, or it can stop the person currently speaking to add an element that is not known by this person.

This element has a direct effect on what is being said. For example, the person speaking declares, “we will start working tomorrow.” The person is interrupted by someone else who declares it will only start next week because of the late arrival of materials.

Those gestures are based on known gestures that are used in other domains, which makes them easy to learn.

XII.3. Notes

The “distribution of speech” has to be careful and look at every participants when no one is asking to speak.

Therefore, they can use their eyes to call out to somebody who may want to speak but is too shy to ask.

This needs a certain understanding of non-verbal communication.

It is very useful for meetings where you find people with a strong personality and some with a more reserved one.

XIII. Cross tables

This method details how to define actions to answer needs that were not identified beforehand. Find inspiration for new actions to set up.

XIII.1. Framework

Cross tables are particularly adapted to find inspiration. It is useful in a creative context as well as for analyzing problems!

XIII.2. Description

We choose to take two elements that forms the association in the following:

- activities;
- material;
- place of action;
- online tools;
- type of members;
- communication tools;
- statutory goals;
- authorities (board, general meeting…);
- tools;
- partners;
- …

We will take as an example “type of members” and “activities” and put it in lines and columns in the cross table.

At each intersection we write existing elements. We can write NC (not concerned) if the intersection does not make sense.

If an intersection stays empty, we might have identified a need and thus a potential action to undertake.

	Outside activities	**Inside activities**
Adult man	Swimming pool, jogging	
Adult woman	Swimming pool, jogging	Women-only self-defense
Child	Treasure hunting	Board games, video games

The intersection of the lines and columns makes us think in a new way.

Depending on the case, some elements might be more relevant to cross than others.

Example:

- Need to return to your roots? Cross elements like “statutory goals” and “activities” or “statutory goals” and “communication tools/tools”;
- Internal communication issue? Cross elements like “authorities” and “communication tools/tools”;
- …

The lines and columns can be moved or removed.
For example, we have here chosen inside/outside activities.
However we could have taken physical/intellectual activities or fine/gross motor skills…
We also could have used “type of members” with interests or age ranges…
Anyway, this all depends on the context.

XIV. PDCA cycle

What are a project's steps? Which documents are linked to it? How to use elements again? Predict, develop, control, and improve.

XIV.1. Framework

Project preparation and continual improvement. It can also be useful to make everyday tasks easier.

XIV.2. Description

The method contains four consecutive steps that will establish a virtuous circle. To set this up allows you to continuously improve a product, a piece of work, a service, a project, an event…

Initials are:

1. Plan: Plan what you are going to do
2. Do: Develop, implement (can have a test phase)
3. Check: Control, assess
4. Act (or Adjust): Act accordingly to improve action

Some documents, such as the action sheet, include the four steps.

Other documents or methods only represent one of the components and have to be organized with other components introduced below.

XIV.3. Plan

The first step, Plan, involves the planning of the realization. It usually includes three phases:

1. Identification
2. Detailing
3. Looking for implementation

To refer to the previous debriefs at the beginning of the planning can be useful!

(Tools: These steps suits other methods like the seven steps method, the five Ws (What, Who, Where, When, Why), or the 5M method. We will chose one of these according to the realization we plan.)

XIV.4. Do

The Do step is the realization, the implementation. Tests can be relevant.

(Tools: Gantt chart, check-list, PERT chart...)

XIV.5. Check

It is followed by the Check step.

We can check multiple aspects like participation (satisfaction, number...), or implementation (ease, satisfaction, goal reached...)...

(Tools: Debrief, feedback form, survey...)

XIV.6. Act

Then, the Act step involves acting and reacting. The solution that was set up needs to be corrected and improved, but the good aspects that were used can be approved for future use.

(Tools: Take into account the debriefs, feedback form and survey with a new implementation...)

XV. The method in seven steps

Start a project by decomposing it in seven steps. This method works for groups or a single person. Answer a question and put it into action.

XV.1. Framework

This method can be used for an improvement, a project, or to answer to any tasks that can be worded as a question.

This method gives answers and an application.

XV.2. Description

XV.2.1. Step 1: Define the question

Define a simple question, like “how do we plan this barbecue?”.

Word the question clearly so that everyone starts at the same point.

XV.2.2. Step 2: Individual reflection

Everyone thinks individually for a limited time (three minutes or less) and writes one key idea or word per post-it®.

The limited time makes ideas burst out without needing to think too deeply about them. That will be done later.

Individual answers are forcing self reflection to not be influenced by others.

We can ask to write five ideas (or any number) if we want everyone to speak on equal amounts (the most talkative talks less, the most quiet talks more).

XV.2.3. Step 3: Pooling

We display the ideas on a wall or a board, and sort them by theme, much like what we would do for a brainstorm.

We name the groups to see the different sides of the question.

At that moment we may do step 2 again on a smaller time limit to add more post-it® if we are getting inspired by the ideas and group names on the wall.

XV.2.4. Step 4: Interrogations

We list the questions related to the groups.

XV.2.5. Step 5: Correlations

Are all the questions related to the main question?

If yes, proceed.

If not, either we reword the questions by going back to step 4, or we reword the main question.

At that moment, a break is necessary so that everyone looks into the questions to answer them. The meeting continues another day.

Some easier questions may only be attributed to one person.

XV.2.6. Step 6: Research and answers

We look at past debriefs, we look for answers…

We meet again. We share our answers and take decisions if choices are to be made.

XV.2.7. Step 7: Implementation

We implement an action with a PERT chart, a Gantt chart, a checklist or an action sheet depending on the project.

XVI. The 5M

The 5M method is useful for the set up of a project in a short time. It is efficient for the main questions we will have.

XVI.1. Framework

It is used for a project's preparation (object or concept).

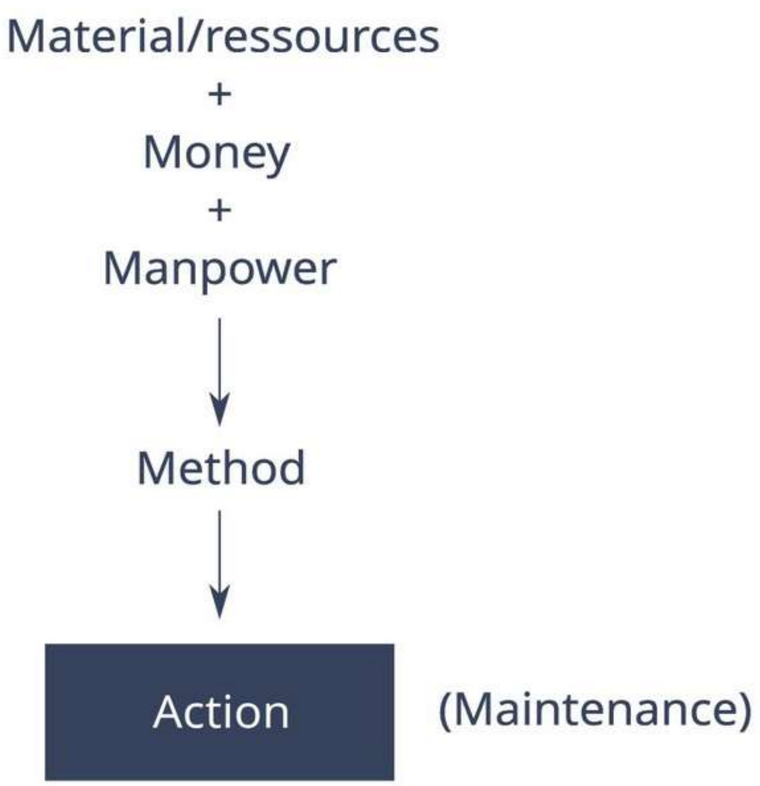
This method provides fast and concrete answers that are useful for the implementation. It is an adaptation of the Ishikawa diagram used to identify the root of a problem.

You can find this method in the action sheet.

XVI.2. Description

The following diagram graphically demonstrates the component leading to an action.

It can be used as a moderated tool for brainstorming, as an overview tool for a problem's cause, or for an implementation.



This diagram is usually structured on the 5M concept.

1. Material, resources. Equipment, machines, computing material, softwares, technologies, basically any material resources, but also intellectual ones (previous debriefs…).
2. Manpower. The people available and their skills.
3. Money. Potential distribution for each area.
4. Method. Depending on the previous three elements.
5. Maintenance. If it is necessary (because of an issue, the weather, the time taken on the project being too long…).

Remember to use the similar previous models again!
This diagram can be used when we quickly need to take a stance on something not to forget a temporality!

XVII. Time circles

The time circle method (or 3T) is useful to quickly visualize how we should organize components for setting them up.

XVII.1. Framework

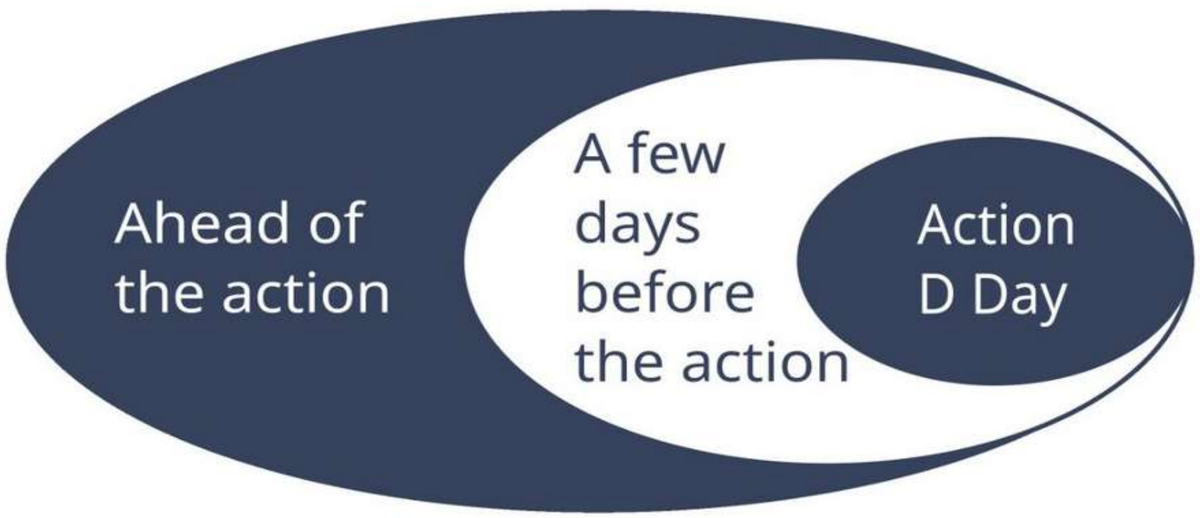
It is used for a project's preparation (object or concept).

This method provides fast and concrete answers for the implementation.

This method allows you to generate a reverse scheduling, used with a Gantt chart, PERT chart, a check-list, and with an action sheet.

XVII.2. Description

Like the 5M method, this diagram graphically represents the times leading to an action. It can be used alone or to complete the 5M.



This diagram is usually structured on the 3T concept:

1. To do in the near future (Time of near future).
2. To do right before the action (Time of a few days before action).
3. To do the day of the action (Time of action).

We can write the components of each time.

Previous times can be connected to the following ones. Here is an example with flyers distribution:

1. To do in the near future: Write a text. Approval of the text by the board of directors. Train people who will be distributing the flyers. Send the training's summary. Look out for volunteers for the distribution.
2. To do right before the action: Remind volunteers. Print the text. Correctly cut the flyers.
3. To do the day of the action: Distribute the flyers.

XVIII. Check-list

A check-list is used to follow the preparatory and additional tasks of an action. Usual, but very efficient.

XVIII.1. Framework

It is used for a project's implementation (object or concept).

XVIII.2. Description

A check-list is not a simple shopping list. It is easy to make, but efficient.

However, be careful not to forget essential components!

Here are some examples of relevant components:

- Who
- What
- When
- Budget
- Connected tasks (before or after)
- Resource person…

A point of contact can be useful to report to them the tasks that are done. This point of contact is a physical person who can use a digital board or a notice board. Therefore, anybody can look at the board to know how it is going.

The physical point of contact serves as a connection. They can remind people, inform everyone on difficulties or on changes caused by restrictions… They are very useful.

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CHECKLIST

Point of contact :
Name

Preparation for action
"Name of the action and date"

Once a task is done, mention it to the point of contact with notes if necessary (mishaps or other).

The point of contact reminds people in case they haven't been heard about when the deadline of a task has passed. They can also remind people beforehand.

Checklist

Name	Mission	Notes (Associated tasks, budget, resources)	Deadline	Done?
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐

XIX. The six thinking hats of De Bono

The six thinking hats is a personal or group management method, allowing us to think differently by changing our thinking approach.

XIX.1. Framework

It can be used to solve a problem, for an implementation, or to bring creativity.

XIX.2. Description

Everyone has their own way of thinking. Edward De Bono defines six of them in his book *Six thinking hats*. In order to think differently, this method approaches problems and subjects in a sequential way.

This method enables us:

- to consider numerous perspectives;
- to avoid self-censorship;
- to admit the existence of different points of view;
- to think unusually for ourselves;
- to accept to take a role;
- to identify consistent solutions.

Each participant uses one “hat” with a specific color, depicting a role. Each participant will have to wear each of the six hats so they can approach every perspective on the subject. Multiple hats can be identical at a given moment.

The white hat

Rationality

-Tangible and available data
-No interpretation
-Neutral
-Facts, numbers, sourced information...

The yellow hat

Optimism

-Positive thinking
-Taking every advantages of the decision and their values into account
-Constructive

The red hat

Emotion

-Use their intuition
-Feelings, instinctive reactions
-Subjective

The black hat

Pessimism

-Looking for negative aspects
-Caution, danger
-Why it will not work
-Looking for weak points

The green hat

Creation

-Imagine creative solutions
-Feel free to follow your imagination
-No criticism of any ideas, but they can push them
-Provocative, eccentric

The blue hat

Logic

-The person that leads
-Sums up ideas
-Asks for the group to change hats
-Conductor

XX. Icebreakers

Icebreakers are useful to feel comfortable in a group to know each other and to feel better in a group of strangers.

XX.1. Framework

Used to feel better in a group of strangers.

XX.2. Description

The different methods introduced in the following are coming from the book *Boîte à outils d'éducation active* from the CEMEA.

XX.2.1. Good morning, what about you?

In a limited space, participants are walking without talking to each other. At the facilitator's signal, participants form groups of two and introduce themselves: "Good morning, my name is... what about you?". At any new signal, the pairs split and participants form new groups of two.

Note: We can add other introductory elements if it seems relevant.

XX.2.2. Collective fainting

Each participant has a secret number. Participants walk in a room and the facilitator reveal a number. The person associated with the number slowly falls (and can potentially moan a little). The other participants have to catch them before they fall on the ground. Another number is revealed... If the group is efficient, two numbers can be revealed at a time.

XXI. Group mapping

Group mapping allows the people in the group to know each other and it facilitates group cohesion. Knowing the others and their desires.

XXI.1. Framework

We can use it to know the others and their desires within a group.

XXI.2. Description

The different methods introduced in the following are coming from the book *Boîte à outils d'éducation active* from the CEMEA.

XXI.2.1. CV minute

The CV minute is an A4 sheet, divided in four categories:

- my name;
- what I can bring to the group;
- what I hope the group will bring me;
- what are my expectations for this course.

The facilitator presents the CV minute and hand it out to everyone. The participants have two minutes to fill it and one to introduce themselves. They can then display the sheets next to them.

Variation: The introduction can be made as an interview. Person A interviews person B and the other way around.

XXI.2.2. Unreel its reel

Each person takes a string, more or less long. The participants introduce themselves in turn while rolling their thread around their finger.

XXII. Debate tips

Various methods, some famous and some more creative, facilitate the debate during meetings.

XXII.1. Framework

Usable during meetings to facilitate the debate.

XXII.2. Description

The different methods introduced in the following are coming from the book *Boîte à outils d'éducation active* from the CEMEA.

XXII.2.1. Talking stick

The stick or another object symbolizes the right to speak. Only the person with the stick can talk without being interrupted. The stick is then given to another person.

We can view the flow of speech and the potential people that monopolize it.

XXII.2.2. Speaking ticket

Every participant is given several tickets (three for example). Each time they speak, even for a short time, they give a ticket back. Once they are out of tickets, they cannot speak anymore. We can also include a limited time to speak, like three minutes.

XXII.2.3. Canadian list

The people that never spoke have the priority over the ones that already spoke.

Note: We can write on a paper next to the names of the participants the number of times they spoke.

XXII.2.4. Three-part method

We ask an individual, then a group composed of those individuals and then the plenary.

XXII.2.5. Snowball

It takes inspiration from the three-part method.

The facilitator asks to someone, for example, three themes that need to be looked at, then five characteristics of a theme…

In smaller groups, everyone comes with ideas, we keep that same number of ideas after consultation. We repeat the process in larger groups until the group is every participants.

The size of the groups depends on the theme, its complexity, the participants, etc. For a larger group we can make: 1 person, then 2, 4, 8, 16, 32…

XXII.2.6. Consultation

XXII.2.6.a. Leading a consultation

Having a common action: We want to coproduce, not just say our point of view.

Having two frameworks:

- one definite precise framework;
- one open to debate framework (to find solutions).

We give a specific framework and reframe anything out of it.

XXII.2.6.b. Coproduction

It is necessary for the participants to voice their motivations and their fears. It can be done by speaking, writing on a paper, on a board… It usually happens at the start to not begin with unspoken frustration.

It is useful to:

- favor the participation,
- enable implication,
- have a way to choose (debate, consensus, consent, but no frustrating vote).

XXII.2.6.c. Dynamics

The facilitator must be positive and put people at ease. They listen and reword. They let people express their feelings.

Having another point of view on the theme makes it more real, the same as having an exterior contributor that is involved and motivated.

The facilitator must be dispensable. It is of the interest of the group to show the collective motivation.

XXIII. Analysis of process

What are a the steps of a project or an action? This approach allows us to define the material and non-material needs for an implementation.

XXIII. 1. Framework

This approach allows us to define the material and non-material needs for an implementation.

XXIII.2. Description

The analysis of process allows us to divide in steps an action or project to define its needs.

In the example below, we define the relationship with a member.

1. We define the steps.
2. We sort them.
3. We define in the example below the document to create, but we could as well define the needs for tools, skills, place, resources, people, etc., or even everything at once.

At first we idealize the needs, we think of what would be the best possible things we would get, then we write it on the plan. It may be impossible to do everything because of constraints (money, time, lack of people...). Of course, we can try to overcome those constraints. It is nice to keep an idealized view of the action or project if they happen again or if constraints are overcome at some point.

First contact

Tools:
-Contact paper
-Calendar for appointments

Reception

Tools:
-Membership card
-Presentation booklet

Follow-up

Tools :
-Individual notebook
-Patronage

In “to get a good start”, other elements of this method are explained.

XXIV. Future projection

Look at a project in a positive and engaging way to see the obstacles and how to overcome them during the implementation.

XXIV.1. Framework

This method allows to grasp the future with more tranquility and lift any mental block you could have.

XXIV.2. Method context

When leading a project, we do not always expect every obstacles that we will face.

It is possible to give up on the way.

Usually, when planning the steps of a project, we start from present time to plan the future. It is a good thing but it shows a quite tedious path ahead.

With this approach, we can add another view that works the other way around, from future to present.

XXIV.3. Method presentation

The goal is to look at a project in a positive and engaging way to see the obstacles and how to overcome them.

XXIV.4. Trial by the method

Come on! Let's begin!

XXIV.4.1. Instructions

XXIV.4.1.a. Method 1

1. Try to view your project as finished, which should bring you joy ;).
2. Enjoy the moment, inspect what is happening all around.
3. Now, ask yourself: How did you manage to get there? How much time did it take? What were the obstacles you met and how did you walk around them?
4. Write everything down to prepare your project.

You can also divide the steps you saw as obstacles and apply the same method.

XXIV.4.1.b. Method 2

1. Imagine a temporal line on the ground.
2. Where is the past and where is the future?
3. Position yourself on the present.
4. Walk to the point in the future where your project is implemented. How did you manage to get there? How much time did it take? What were the obstacles you met and how did you walk around them?
5. Now go back to the present. Each time you make a step, explain where you are at in the project.
6. Write everything down to prepare your project.

XXV. Transformational

Transformational language is a method with applied features related to expression to know if a wish is doable.

We talk about “transformational language” when an expressed wish contains the following features:

- the results are the responsibility of the subject,
- expressed with positive feelings,
- accurate and with a given context,
- controllable,
- ecologic,
- realistic/doable,
- motivating.

For each project, these terms can help express our ideas better.

XXV.1. The results are the responsibility of the subject,

If it is related to someone else or something else, the approach will be different.

I may be highly motivated when I chose the lottery numbers, I do not have any influence over the results.

XXV.2. Expressed with positive feelings

We already tackled the importance of a positive wording.

XXV.3. Accurate and with a given context

Context and accuracy are helpful for the implementation.

XXV.4. Controllable

Can I concretely check the results I am creating?

XXV.5. Ecologic

Here, ecologic means incorporated in our environment. Some actions require specific conditions.

XXV.6. Realistic/doable

Even if I want to be Superman, I cannot ;) Knowing your limits is necessary.

XXV.7. Motivating

A motivating wording is way more efficient to take action!

XXVI. “But” and “therefore”

A scenario writing tool that you can adapt and that can be useful to make a text, arguments, or a presentation livelier.

XXVI.1. Framework

This method can make a text livelier by linking ideas.

XXVI.2. Method context

When we write a text, we may structure our ideas like this: “Sentence 1/idea 1” **then** “sentence 2/idea 2” **then** “sentence 3/idea 3”…

XXVI.3. Method presentation

This method is quite easy, we change “then” (expressed or in mind) for “but” or “therefore”.

“therefore” will develop the action, whereas “but” will oppose it.

We can also add other coordinating conjunctions such as “because” to explain the action.

This very easy method is very popular. “South Park” creators use it a lot.

XXVII. Snowball

The snowball method is a fast and efficient idea maturation, made by pooling on a same theme.

XXVII.1. Framework

This method enables;

- to find relevant terms to assign to an idea;
- to simplify an idea to its radical.

XXVII.2. Method context

To pool ideas can take a lot of time, lead to never-ending debates, and does not allow everyone to express themselves. The snowball method can actually allow most of this.

XXVII.2.1. Method 1

A concept's essentials. We need to sort out three principles on an idea (a project's implementation, a term's definition, ideas reflected by a flyer...).

1. The theme is declared.
2. Individually, we think about three principles linked to the theme.
3. Then, 2 by 2, we share and keep only three principles linked to the theme.
4. Then, 4 by 4, we do the same.
5. Until everyone is reunited.

XXVII.2.2. Method 2

We need a maximum of ideas. We do the same, but without limiting the number of ideas. Everything can be noted down as we can talk about it later.

Therefore, everyone can express themselves and can get inspired by each other's ideas, without focusing only on this.

We can add ideas little by little.

XXVIII. Moving debate

The moving debate consists in physically placing yourself according to a proposal, from one side of a line or another. Then, we debate about our opinions.

XXVIII.1. Framework

This method can be useful to talk about a controversial subject or to express our opinions and debate.

XXVIII.2. Method context

The moving debate is useful to debate on a controversial subject.

XXVIII.2.1. Method

- We place a line on the ground. On one side, we "agree" with the proposal, on the other, we "disagree". The farthest we are from the line, the more we agree or disagree.
- A leader will state a proposal (Do you agree with the following proposal: blabla... The proposal must be affirmative, not be a question) that they then write down so it is not misunderstood and so everyone can read it again in details.
- Participants will then place themselves according to their opinion on the subject.
- You can (depending on people's will and on the situation):
  - Let people speak one by one, on one side then another. The person only gives one argument.
  - Do the same but by letting the farthest people talk, then the closest.
  - Let each side have a representative that will speak, on one side then another. The person only gives one argument. Each "side" will decide of an argument to give.
- Participants can move if they are convinced by the arguments.
- We stop once all arguments have been heard.

The facilitator needs to remind everyone that the rule is not to win, but to state every arguments (not feelings or intuitions...).

XXIX. Toolbox

To create a toolbox is useful to keep elements at hand for different types of use (meetings, conflict, choices...).

XXIX.1. Framework

The toolbox is a combination of every tools we can use.

It can be used in any framework (meeting, interventions...) for any types (encounters, conflict, decision to take, implementation...).

XXIX.2. Method context

It can be printed out, laid out tools... that are ready to be used!

Here are some more examples from what we showed in this document.

XXIX.2.1. Dices and cards

Dices and cards are present. They can be used for many things. For example, we express a numbered approval/disapproval that we hide to then display it and debate/give our ideas.

It can be used to define preferences, votes, priorities...

XXIX.2.2. Other

There are many other things we can adapt. Some are more specific to some domains, like the TRIZ method, suitable of technical creativity.

XXIX.2.3. NVC

You will find approaches on solution conflicts and nonviolent communication in the following.

Solutions for a conflict of ideas

Appropriate moment
Report a decision that should not be taken now at another time more suited and calmer.

Opinion or fact?
A fact can be checked, an opinion can be divergent.

Least common denominator
If there is a restriction (ban, phobia, impossibility...)

Argue
Give your arguments and write them down, sum them up if needed.

Reword
Reword if there is a misunderstanding.

Choose between A and B

A | B

A and B: total coexistence possible.

A ∪ B

A and B: merging.

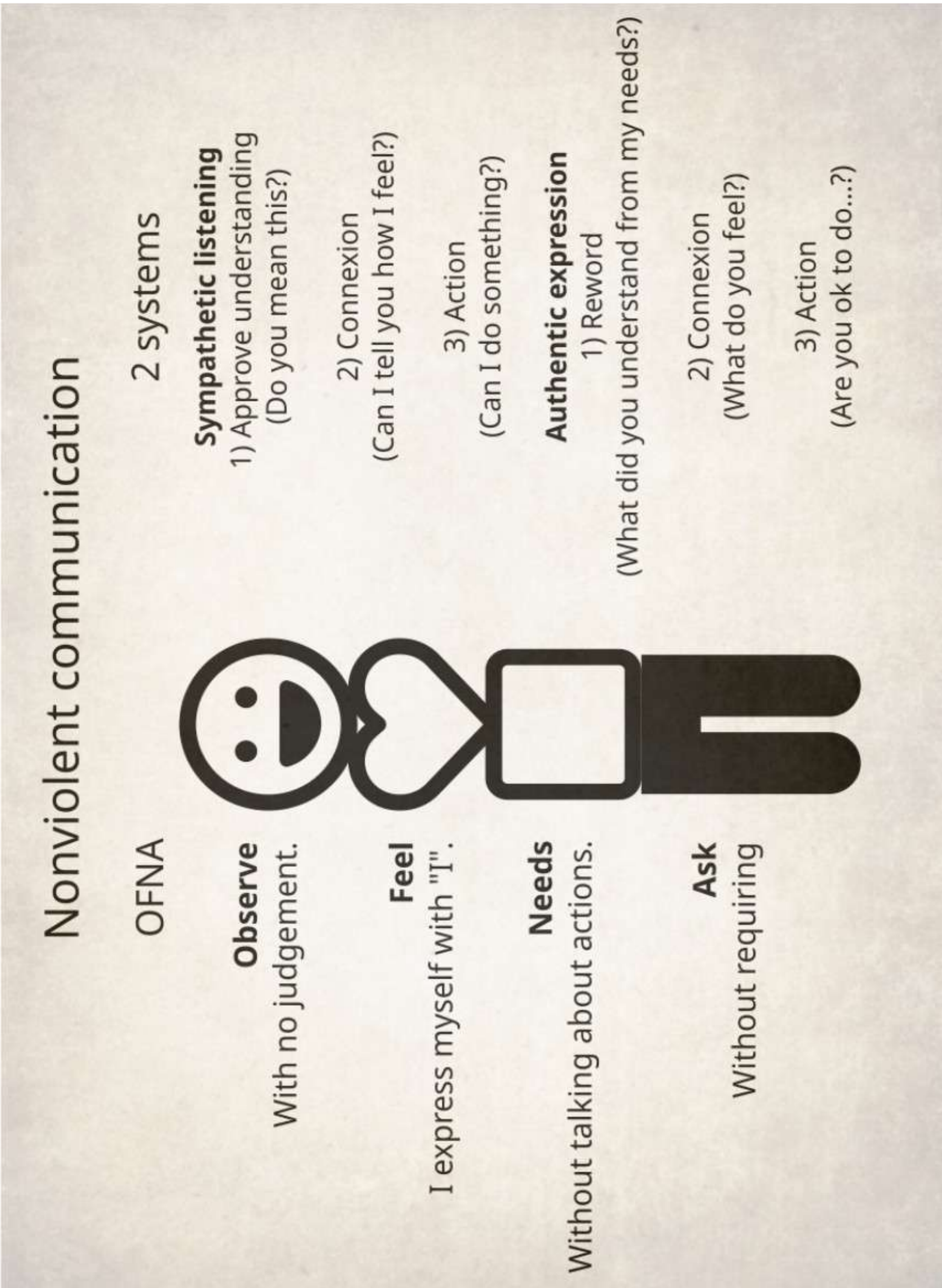
A -- B

A and B: total coexistence in two different times or spaces.

C

C: Satisfying compromise following a pooling of ideas and obligations... To look for if needed.

None: Let it grow if there can't be a solution, even if it means looking for something else and informing yourself.


Nonviolent communication
OFNA
Observe
With no judgement.
Feel
I express myself with "I".
Needs
Without talking about actions.
Ask
Without requiring
2 systems
Sympathetic listening
1) Approve understanding
(Do you mean this?)
2) Connexion
(Can I tell you how I feel?)
3) Action
(Can I do something?)
Authentic expression
1) Reword
(What did you understand from my needs?)
2) Connexion
(What do you feel?)
3) Action
(Are you ok to do...?)

Toolbox
(Free and unrestricted management tools)

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